



**PATRICIA M.
LAMPERT, CFP®**

The Retirement Specialist for
Working Couples & Empty Nesters

MAKING A DIFFERENCE

WINTER, 2007 NEWSLETTER

Christina A. Haciski, Editor & Marketing Manager

2007 Recap

Successful Transition for Expanded Client Base in 2007

January 2007 marked the beginning of a seamless transition of new clients from which I acquired from Paul Hinnebusch, a former colleague at Allegheny Investments. Through this wonderful experience, I met new friends while expanding the business gradually with careful consideration.

We are currently servicing approximately 125 households (close to 200 individuals) and our goal is to continue providing superior service to our existing clients as we continue to grow through 2008.

Holiday Celebrations

In December 2007 and January 2008, we held our fourth annual holiday celebrations in Pittsburgh and Philadelphia/New Jersey areas. Thank you to our clients, family and friends who were in attendance. It is so nice to thank you personally for your business as we mark the end of one year and toast to the next. For those of you who were unable to attend our holiday celebrations, this year donations were made on your behalf to the following organizations:

WASH ARTS (Washington Community Arts and Cultural Center) – Washington, PA www.washarts.org

Washington City Mission – Washington, PA www.citymission.org.

Cathedral of the Immaculate Conception – Camden, NJ www.cathedralcamden.org

Mercy Vocational School – Philadelphia, PA www.mercyvocational.org

New Testament Mission – La Croix, Haiti. Food has been purchased in your name for the people of this community.

www.LaCroixHaitiMission.org

Rock for Autism – This local Pittsburgh event raised money for the National Foundation www.nationalautismassociation.org.

Thank You for Your Referrals

We would also like to take this opportunity to thank those who referred our financial services. Your trust and confidence is greatly appreciated. This has been an excellent way to meet with people who are serious about preserving their financial future. Your referrals are always welcome!



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Securities offered through: Allegheny Investments, Ltd. 811 Camp Horne Road Pittsburgh, PA 15237 Phone: 412-367-3880

Market Jitters

In the midst of heavy market fluctuations and uncertainty in global affairs, focus on long-term results rather than short-term volatility. Please call me at 888-440-4755 with any concerns you may have about your account(s).

2008 Information for Taxes

Increased IRA contribution limits. Beginning in 2008, the maximum yearly contribution for a Traditional or Roth IRA increases from \$4,000 to \$5,000. People age 50 or older before the end of 2008 can contribute an additional \$1,000 for a total of \$6,000.

Thank you for your Online Visit to our Website for Breast Cancer Awareness

Over thirty people visited us online in October to raise awareness for Breast Cancer. We are very grateful to everyone who participated. A \$50.00 donation in honor of the names submitted on our website was placed at the end of December to the Susan G. Komen For the Cure. Thanks again for your support!

Service: A Top Priority

Client Service has always been extremely important to me throughout my professional career. It truly is what secures business relationships. This is why I pride myself on offering excellent client service. As the business grows, client service is always considered in the equation. I have decided to take the proper steps to secure top service for my clients. I have managed this in two ways:

First, I have begun the implementation process for a new technology that will allow for a central location of your information. This will provide real time information about your account for you and me.

Secondly, I have hired a Client Service Manager to handle this conversion to the internet-based system. We are very excited to announce that Linda Meeks accepted this role in early January of 2008. We estimate a six-month period for a complete conversion. Linda will also assist with creating client quarterly reports. She brings with her over 15 years of client service experience in the title and mortgage industry. Welcome to the firm, Linda!

For Your Information

From the Pittsburgh Business Times 2008 Book of Lists:

- Allegheny Investments - #7 on the 25 largest Pittsburgh area Investment Services Firms list
- Allegheny Financial Group - #12 on the 25 largest Pittsburgh area Money Managers list

Trish's Tips: Health Savings Account (HSA) – Rollover from IRA

The Tax Relief and Health Care Act of 2006 allows a once in a lifetime rollover from traditional IRA to a Health Savings Account. The amount of the rollover is limited to the yearly contribution (\$2,850 for single, \$5,650 for family), plus catch-up contributions if eligible.